Utah State Division of Risk Management

2009 Self Inspection Survey

To All Of Our Valued Clients

- The Administration and Staff of the Utah State Division of Risk Management would like to guide you through the "2009 Self Inspection Survey" training and to thank you for your participation.

Purpose

- Claims histories have always given us guidance on liabilities that threaten your facilities. The inspections performed by our loss control specialists lend another set of eyes and ears to identify hazards and give recommendations to solve problems. But this survey will now establish trends from your own perspective.

Utilizing the Survey

- **The manner in which you utilize this information is only limited by your imagination.**
  - Clients are generating work orders from the data.
  - Others use data to help budget maintenance expenditures. Still others identify uses for their limited resources.
  - An honest and accurate survey will generate change, record the problems, and eliminate the most hazardous problems in order of priority.
  - The findings validate commonly known conditions, detail current needs and allow for open discussion to gain resolution.

What You Asked For

- More security with your surveys and data
- More control
- Access to data
- Better reports
- Lock and Unlock capability
- More concise questions
- Specific questions that were overlooked

What You Asked For Cont.

- Organizations will have inspectable areas based upon their type of organization

- Inspectable area changes
  - Organizational Practices (replaced administration) - Available to all agencies. Only needs to be filled out for the main facility of the organization, and covers the entire organization. **<u>DOES NOT NEED TO BE DONE FOR EACH FACILITY</u>**.
  - Office Environment – Answers specific question about office spaces. Can be filled out by the Office Personnel.
  - Building Maintenance - Mandatory to be filled out on all buildings. Can be filled out by Maintenance Personnel.
  - Residence Facilities - Answers questions pertaining to the residence locations.

What You Asked For Cont.

- Surveyors can be assigned to more then one organization.

- Coordinators can lock and unlock surveys from the coordinator area.

- Coordinators can develop and either print reports or save them for the corrective actions of their organization.

Changes (Continued)

- The list of facilities that require an inspection has been shortened to buildings with higher occupancy, multiple use and more hazard exposure.

- Portable and satellite buildings have been grouped with the main facility to minimize additional surveys.

- Prominent buildings not found on your organization's building list do not have to be surveyed.

  – As you construct new buildings and eliminate facilities, complete the building identification survey and submitted it to Risk Management for coverage purposes.

Features

- A new feature is the "Where Am I" box.

  If at any time you question where you are, click on this box to view a navigation diagram.
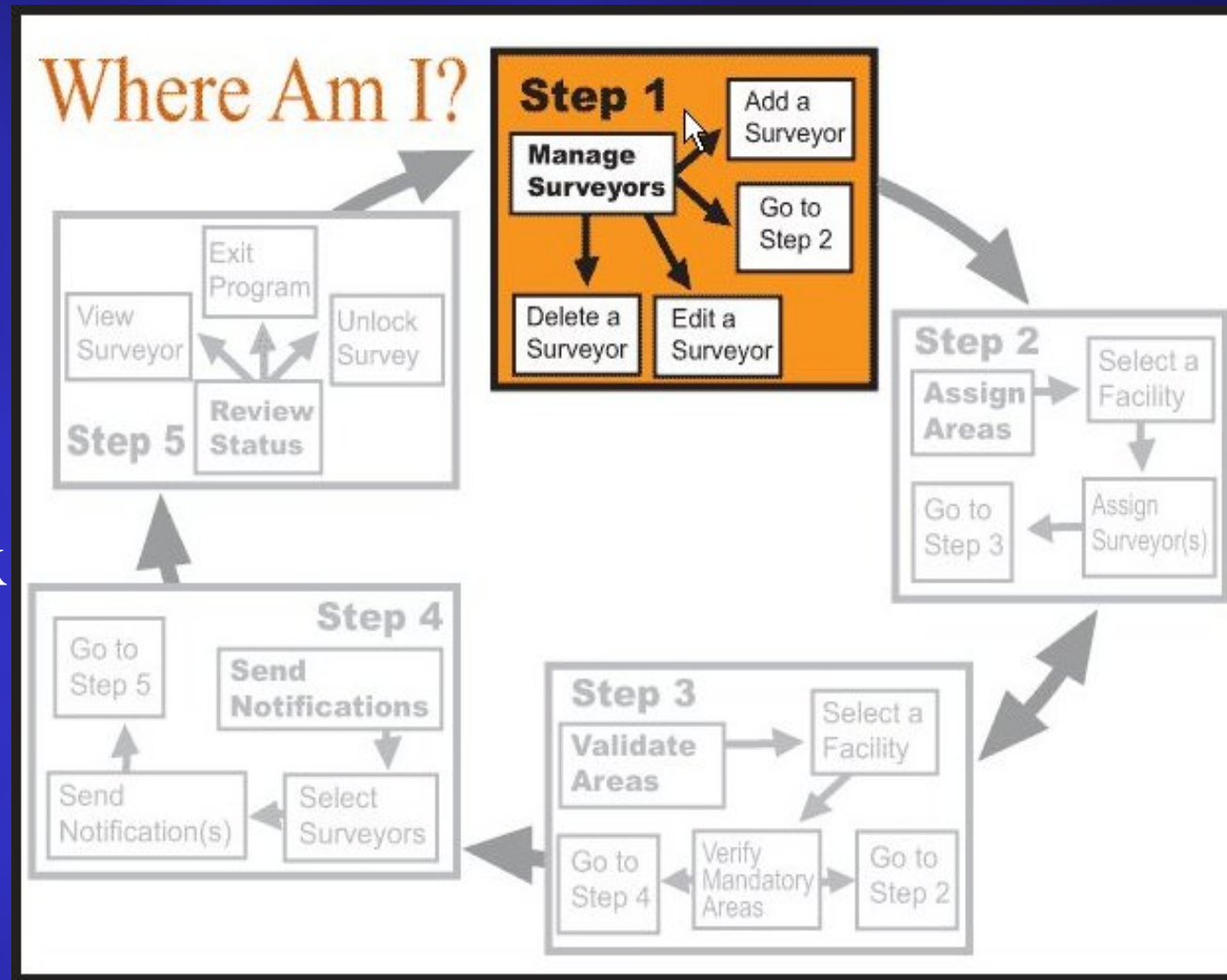
Features (continued)

Three helpful tools can be accessed on the left-hand side of each survey page:

- **FAQ** – This link directs you to frequently asked questions, a problem solving tool that will be available for both coordinators and surveyors.

- **Email Risk Management** - This link enables coordinators to contact a SIS Administrator at DRM with any questions or concerns about the survey.

- **Take a Survey** - This link allows coordinators to access a survey. You must add yourself as a surveyor if you will be doing surveys.

Controls For Risk Management

- We can add or delete coordinators.
- We can access information and reports.
- We can answer questions .
- We can give additional training on-line or upon request.
- We can add, delete, and modify questions, groups, organizations and facilities.

Coordinator's Role in Survey Development

- Identify and add every Surveyor for your organization.
- Select a facility and assign individual Surveyors.
- Assign areas of inspection (inspectable areas) to each Surveyor.
- Verify that all inspectable areas/buildings have been assigned.
- Send notifications to Surveyors regarding their assigned buildings and inspectable areas.

The Self Inspection Survey

The following slides are a step-by-step progression of the screens that appear on the Self Inspection Survey. As we navigate through the survey, follow along on your own computer. If at any time you are not on the same slide, please ask for assistance from one of the Risk Management staff.

On the internet go to the
RISK MANAGEMENT HOME PAGE
at www.risk.utah.gov

Click on Self Inspection Survey Link on
the Left Side

Google™ Custom Search   Search

The Department of Administrative Services

Division of Risk Management

SERVICES ELEVATED

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DAS Home

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Division of Risk Management

Our division is an integral part of the Department of Administrative Services. Our role is to provide insurance coverage for all state agencies. This coverage includes liability insurance, property insurance, and vehicle coverage. Included in this coverage group are all state universities and colleges, school districts and most of the charter schools.

What's News

- **"Yours, Ours, Mine - Protecting Your Assets"**
  Fraud and Embezzlement Training Presented by the Division of Risk Management, with assistance from the Utah Attorney Generals Investigation Division, State Auditors Office, Utah Division of Insurance Fraud, Department of Technology Services and Moreton & Company. Please mark November 18th on your calendar now. Map

  REGISTER NOW!!

- **New Web Page**
  The division is proud to announce the launch of a new and interactive webpage. In our effort to provide our customers, the best service available and to allow them that, access twenty-four hours a day every day. We have put most of our forms and information online. We will be adding training, and information weekly. Please look around and come back often, as content will be changing.

Location and Hours

The Division of Risk Management in support of Governor Huntsman's "Working 4 Utah" initiative has changed their hours. Our new hours are Monday through Thursday, 7:00

Our Mission:

To protect State assets, to promote safety, and to control against property, liability, and auto losses.

Coordinators Log in

Surveyors Log in

Frequently Asked Questions

Training

Click on the *Risk Coordinator Log-in* link and you will be taken to the UMD Login page

DTS Department of Technology Services
Utah Master Directory (UMD) Login Page

UMD Security Authentication:

Requesting Coordinators must be registered users of UMD for controlled access to Utah State Applications. If a Requesting Coordinator does not have a UMD login and password, s/he will need to click "Create new user account" on the UMD login page. Because validations of the requests are conducted via email, Requesting Coordinators must have a valid email address. Some email addresses take longer to validate through outside systems, i.e., yahoo.com, hotmail.com, etc.

Welcome

Registered Users

Email Address [   ]

Password [   ] (HELP)

☐ Manage account after logging in.

[Login]

Your user id does not have permission to access the requested site.

Public Citizens & Non-State Employees (HELP)

You can create a new user account by clicking on the following link. Some applications may require further account enhancements before you will be able to access them.

Create new user account

Privacy Policy | Disclaimer Statement | Customer Support

Requesting Coordinators will receive an email (same address provided) from UMD with an authorization code to log into the Master Directory System. This will give access to the State Network. The application process is the next step.

Enter your information in the fields. A red asterisk indicates a required field. The user ID field may contain any unique entry.

New User Creation - Step 1 of 4 (General Info)

* Indicates a required field.

Field	Value
*First Name	John
Middle Initial	
*Last Name	Doe
Full Name	John Doe
*Primary Email	jdoe@yahoo.com
Secondary Email	jdoes@aol.com
*User ID	Jdoe

Next >>

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Enter a unique password with a minimum of 8 characters. Any combination of numbers and letters may be used.
Enter a recovery question only you will know the answer to.
Enter the answer to the question.
Enter your password, then enter the password again to confirm.

New User Creation - Step 2 of 4 (Password Info)

* Indicates a required field.

*Password Recovery Question	Who is my mother	Tips
*Password Recovery Answer	I do not know	Help
*Password	•••	
*Confirm	•••	

<< Previous | Next >>

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Enter your information in the fields.
Click next

New User Creation - Step 3 of 4 (Personal Info)

Home Street	5120 State Office Building
Home City	Salt Lake City
Home State	Utah
Home Zip	84114
Home Phone	801-538-9560
Birth Date	01 Jan 1972

<< Previous | Next >>

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Enter your information.
Click finish

New User Creation - Step 4 of 4 (Work Info)
* Indicates a required field.

Title	Risk Coordinator
Company	Granite School District
Department	Risk
Street	5421 State Street
P.O. Box	
City	Salt Lake City
State	Utah
Zip	84114
Phone	801-538-9560
Cell	801-458-9856
Pager	
Fax	

<< Previous | Finish >>

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After the Login Function has been completed, the Self Inspection Screens Will Appear In the Following Order

(The next two slides can be skipped if you were a coordinator last year)

Risk Management Self Inspection Survey

System Message

You have successfully registered for UMD (Utah Master Directory) access. This is only one step in gaining access to secure applications under UMD control. Now you will need to request application access. To do this please select the "Request Access" button and an automated email will be sent to the application administrator.

Request Access

If you have any questions, please contact Risk Management via email at sis@utah.gov

Click the "Request Access" button. An email will automatically be sent to sis@utah.gov for the DRM ADMIN to grant access to the Requesting Coordinator.

Risk Management Self Inspection Facility Survey

Email successfully sent.

System Message

Currently you do not have access to this site. To request access click the button below.

Request Access

If the error persists, please contact Risk Management via email at sis@utah.gov

The Requesting Coordinator will know the message has been successfully submitted via the above-shown confirmation.

Coordinator Home Page

- On this page you are welcomed as a coordinator.

- If you do not have the list of facilities, you are required to survey go to step #2, copy and save the list.

- Go back to step #1 Manage Surveyors.

Manage / Add Surveyors

- On this page you will add all of the surveyors for your facilities.
  - Name, phone number and e-mail address are required.
- You can also edit any errors you have made.
- You can delete a surveyor.
- When completed go to step #2 Select Facility.

Risk Management Self Inspection Survey
Coordinator
Step 1: Manage Surveyor(s) for RISK VISITORS ORGANIZATION

Where Am I?

Coordinator Steps

1 Manage Surveyor(s)
2 Select Facility
3 Verify Insp. Areas
4 Send Notification(s)
5 Review Status

FAQ

Reports

Email Risk Management

Print Self Inspection Survey

Take a Survey

Your Surveyor(s)

	Surveyor(s)	Facility(s) Assigned
Edit	Butterfield, Keith	Building 1
Edit	Guinee, Mark	Building 2
Edit	Leonard, Don	Building 1
Edit	Rippard, Joe	Building 1

* First Name: [   ]   *Last Name: [   ]

*Phone: ([ ]) [ ] - [   ] (000) 000-0000

*Email: [   ]

[Add Surveyor]

Options

Add Surveyor: Above, fill in the form above and click on the "Add Surveyor" button.
Edit: Above, click on the Edit text link in the table to edit the Surveyor information then click the "Save Surveyor" button.
Delete: Above, Click on the Delete text link in the table above to delete the Surveyor. Note: If a Surveyor has been assigned Inspection Areas the Surveyor cannot be deleted.
Go to Step 2: Click on the "Go to Step 2" button when you are finished adding Surveyor(s).
Cancel: Return to the Login page.
Exit: Click the Exit button below to exit this program.

[Go to Step 2] [Cancel]   [Clear] [Exit]

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Click "Go To Step 2" to Select Facility Page

Risk Management Self Inspection Survey
Coordinator

Where Am I?

Step 1: Manage Surveyor(s) for RISK VISITORS ORGANIZATION

ADMINISTRATIVE SERVICES

RISK MANAGEMENT

Coordinator Steps

1 Manage Surveyor(s)
2 Select Facility
3 Verify Insp. Areas
4 Send Notification(s)
5 Review Status

FAQ

Reports

Email Risk Management

Print Self Inspection Survey

Take a Survey

Your Surveyor(s)

	Surveyor(s)	Facility(s) Assigned
Edit	Butterfield, Keith	Building 1
Edit	Guinee, Mark	Building 2
Edit	Leonard, Don	Building 1
Edit	Rippard, Joe	Building 1

* First Name: [   ]   *Last Name: [   ]

*Phone: ([ ]) [ ] - [   ] (000) 000-0000

*Email: [   ]

[Add Surveyor]

Options

Add Surveyor: Above, fill in the form above and click on the "Add Surveyor" button.
Edit: Above, click on the Edit text link in the table to edit the Surveyor information then click the "Save Surveyor" button.
Delete: Above, Click on the Delete text link in the table above to delete the Surveyor. Note: If a Surveyor has been assigned Inspection Areas the Surveyor cannot be deleted.
Go to Step 2: Click on the "Go to Step 2" button when you are finished adding Surveyor(s).
Cancel: Return to the Login page.
Exit: Click the Exit button below to exit this program.

[Go to Step 2] [Cancel]   [Clear] [Exit]

Select Facility Page

- Select a building by clicking on the radio button next to the desired facility.

- You can also search for the facility by typing its name in the field next to "Facility Name".

- After your selection click Submit.

Select Facility Submit Page

ADMINISTRATIVE SERVICES

RISK MANAGEMENT

Risk Management Self Inspection Survey
Coordinator

Where Am I?

Step 2: Assign Inspection Area(s) to a Surveyor(s)

Coordinator Steps

1 Manage Surveyor(s)
2 Select Facility
3 Verify Insp. Areas
4 Send Notification(s)
5 Review Status

FAQ

Reports

Email Risk Management

Print Self Inspection Survey

Take a Survey

— Select a Facility —

Facility Name: [   ]

	Facility Name	Address	Surveyor(s) Assigned
○	Building 1	5120 STATE OFFICE BUILDING	Butterfield, Keith
			Leonard, Don
			Rippard, Joe
○	Building 2	4120 STATE OFFICE BUILDING	Guinee, Mark
○	Building 3	3120 STATE OFFICE BUILDING	

— Options —

Facility Name: Start typing the name of the Facility for quick searching.
Submit: Select a Facility by clicking the Facility's radio button in the table above then click on the "Submit " button to assign Inspection Areas.
Cancel: Return to the Login page.
Clear: Clear all the selections or data entered.
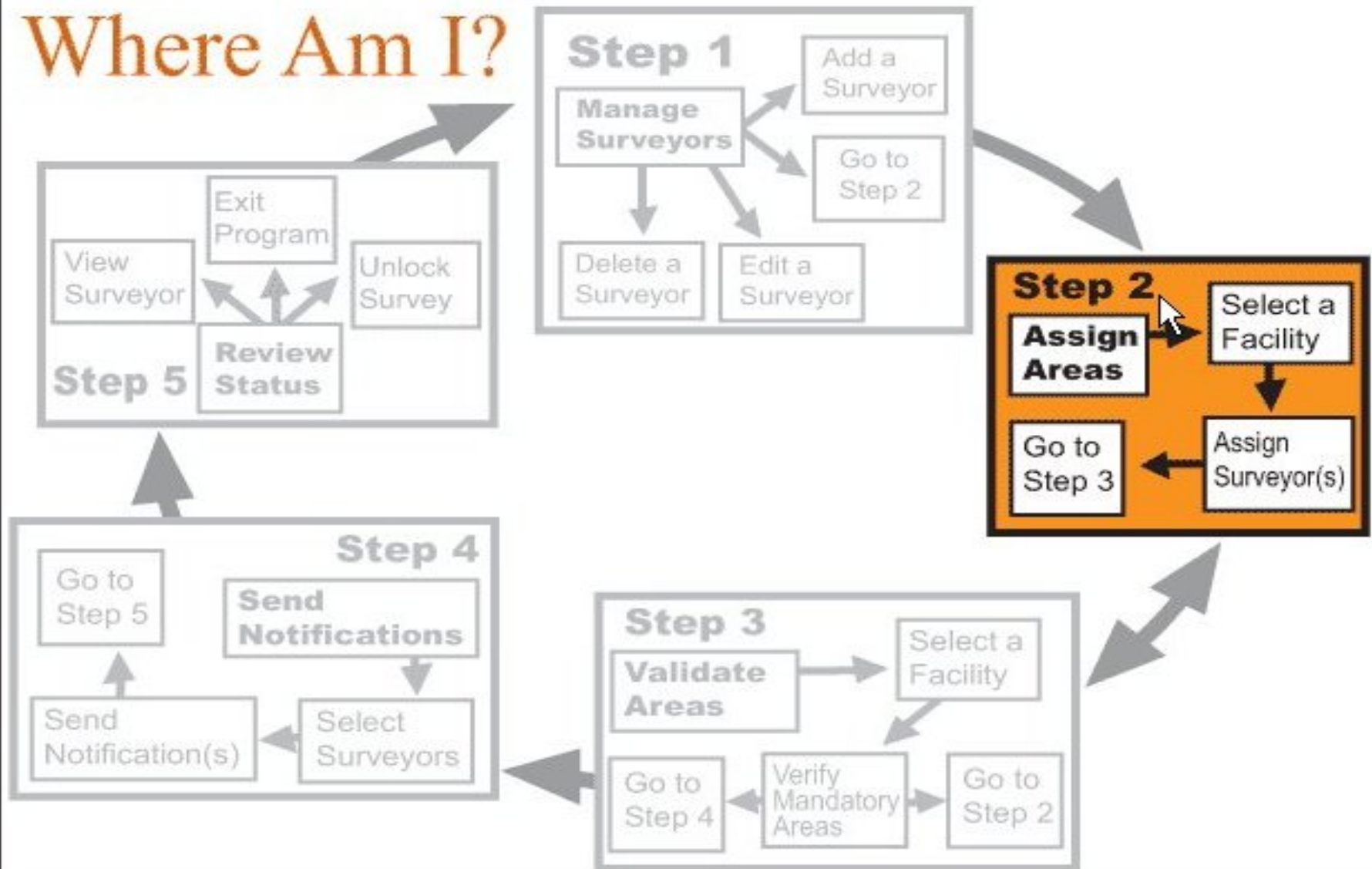**Exit:** Click the Exit button below to exit this program.

[Submit] [Cancel]   [Clear] [Exit]

Assign Inspection Area to a Surveyor

- The name of the facility will be displayed with facility number and address.
- From the list of surveyors select the one you would like to do the survey.
  - Additional surveyors can be added later.
- Click Submit button to continue.

utah.gov

ADMINISTRATIVE SERVICES

RISK MANAGEMENT

Risk Management Self Inspection Survey
Coordinator

Where Am I?

Step 2: Assign Inspection Area(s) to a Surveyor(s)

Coordinator Steps

1 Manage Surveyor(s)
2 Select Facility
3 Verify Insp. Areas
4 Send Notification(s)
5 Review Status

FAQ

Reports

Email Risk Management

Print Self Inspection Survey

Take a Survey

Select a Surveyor

Facility Number:	002
Facility Name:	Building 2
Address:	4120 STATE OFFICE BUILDING
City:	Salt Lake City
Zip:	84114

	Surveyor(s)	Inspection Area(s) Assigned
○	Butterfield, Keith	
○	Guinee, Mark	General
○	Leonard, Don	
○	Rippard, Joe	

Options

Submit: Select a Surveyor by clicking on the Surveyor(s) radio button then click on the "Submit" button to Assign Inspectable Areas.
Cancel: Return to the Login page.
Clear: Clear all the selections or data entered.
Exit: Click the Exit button below to exit this program.

Submit   Cancel

Clear   Exit

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Assign Inspection Areas

- A list of inspectable areas will be displayed.

- Select the inspection areas this surveyor will inspect.
  - Check only the areas that exist in the building and on the grounds.

Special Areas

- The Organizational Practices Inspectable Area should only be assigned to your organization's administration building or home office. Not for each building.

Assign Areas to a Surveyor

- If multiple surveyors will be assigned to a facility, click on the radio button for the next surveyor and select the areas that s/he will inspect. Click "Submit".

- You cannot select multiple surveyors at the same time for different areas of a facility.

Assign Inspection Areas New Surveyor

- After the inspectable areas for the new surveyor have been selected click the Submit button.

Add Surveyor Verify Inspectable Areas

- As surveyors are added, the names and corresponding assigned areas will be posted on the screen.
  - Once all Inspection Areas have been assigned, you can go to Select Facility on the left hand column to work on another facility **_or_**;
- When all assignments have been made move on to "Step Three".

"Where Am I" Step 2

Verify Mandatory Inspectable Areas

- In step #3 all facilities will be shown with the corresponding mandatory areas to be inspected. If a mandatory area has not been assigned, go back to step #2 and assign that area to a surveyor.

- When all mandatory areas have been assigned the facility will not be listed.

- Move on to Step #4.

"Where Am I" Step 3

Send Notification to Surveyors

- The survey is ready to be taken. This will send an email to the surveyor with the facility information.

- Select the surveyor(s) you want to notify and click the "Notify" button.

Send Notification to Surveyors

Confirm Notification of Surveyors

- This page gives confirmation that the notification has been sent. If more surveyors must be notified click the "Notify More" button and continue.

- When all notifications have been completed move on the Step #5.

"Where Am I" Step 4
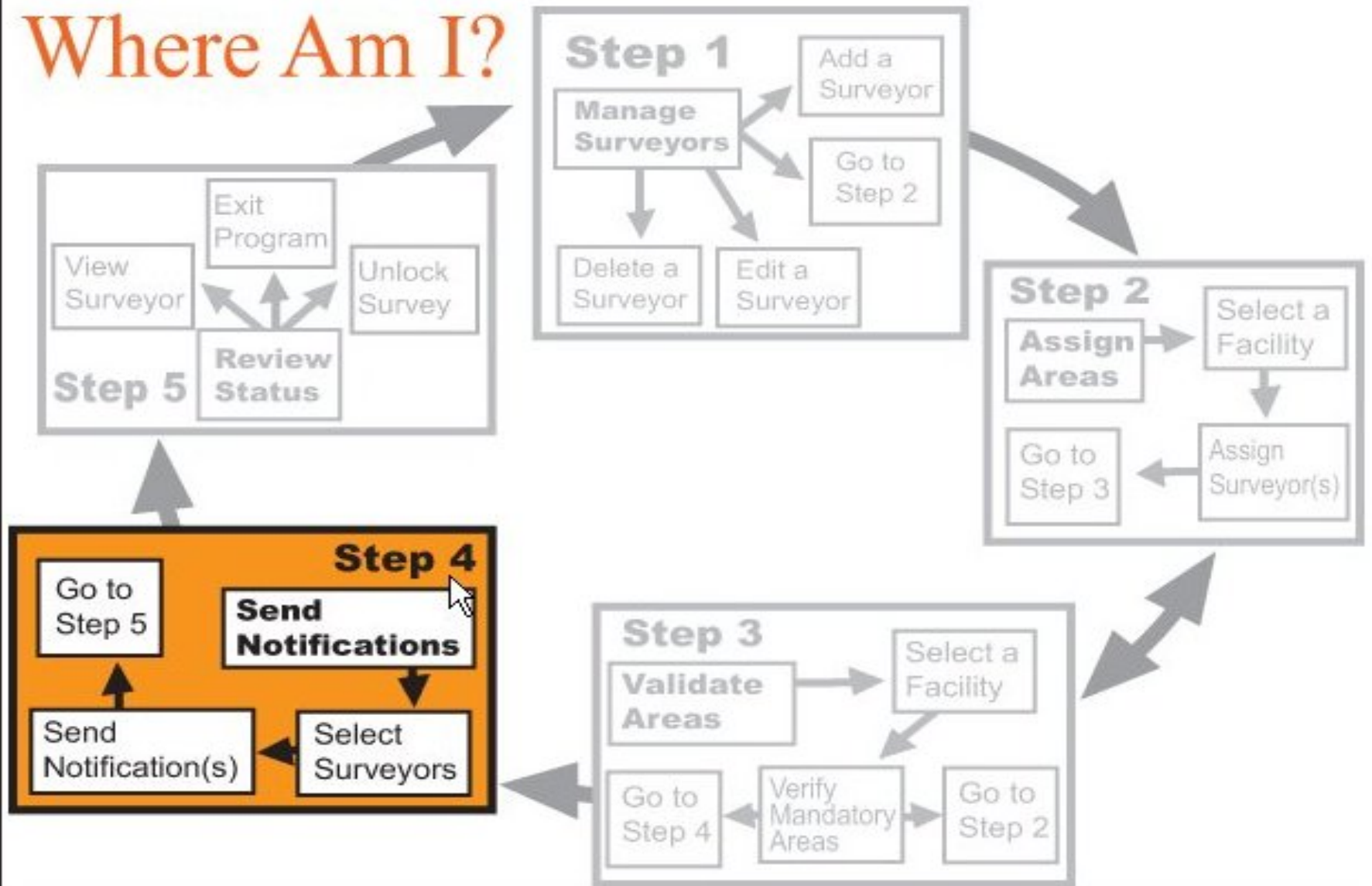
Review Status of Your Facilities

- Unlock and lock a facility survey.

- You can unlock a survey that has been completed by a surveyor. Click the "Unlock" button.

- Click the "Review" or "Cancel" button if desired.

Review Status of Your Facility(s)

The completion status of each facility can be reviewed, including completed or non-completed questions.

Review Status of Your Facility(s)

You can also email a surveyor from this page by clicking on his or her name.

File   Edit   View   Actions   Tools   Window   Help

Send   Cancel   Address   Spell Check

Mail   Send Options

From: Jeff Rose   CC:

To: jjackson1@utah.gov   BC:

Subject:

Arial   10   **B** *I* U

Where Am I?

Step 1
Manage Surveyors
- Add a Surveyor
- Go to Step 2
- Delete a Surveyor
- Edit a Surveyor
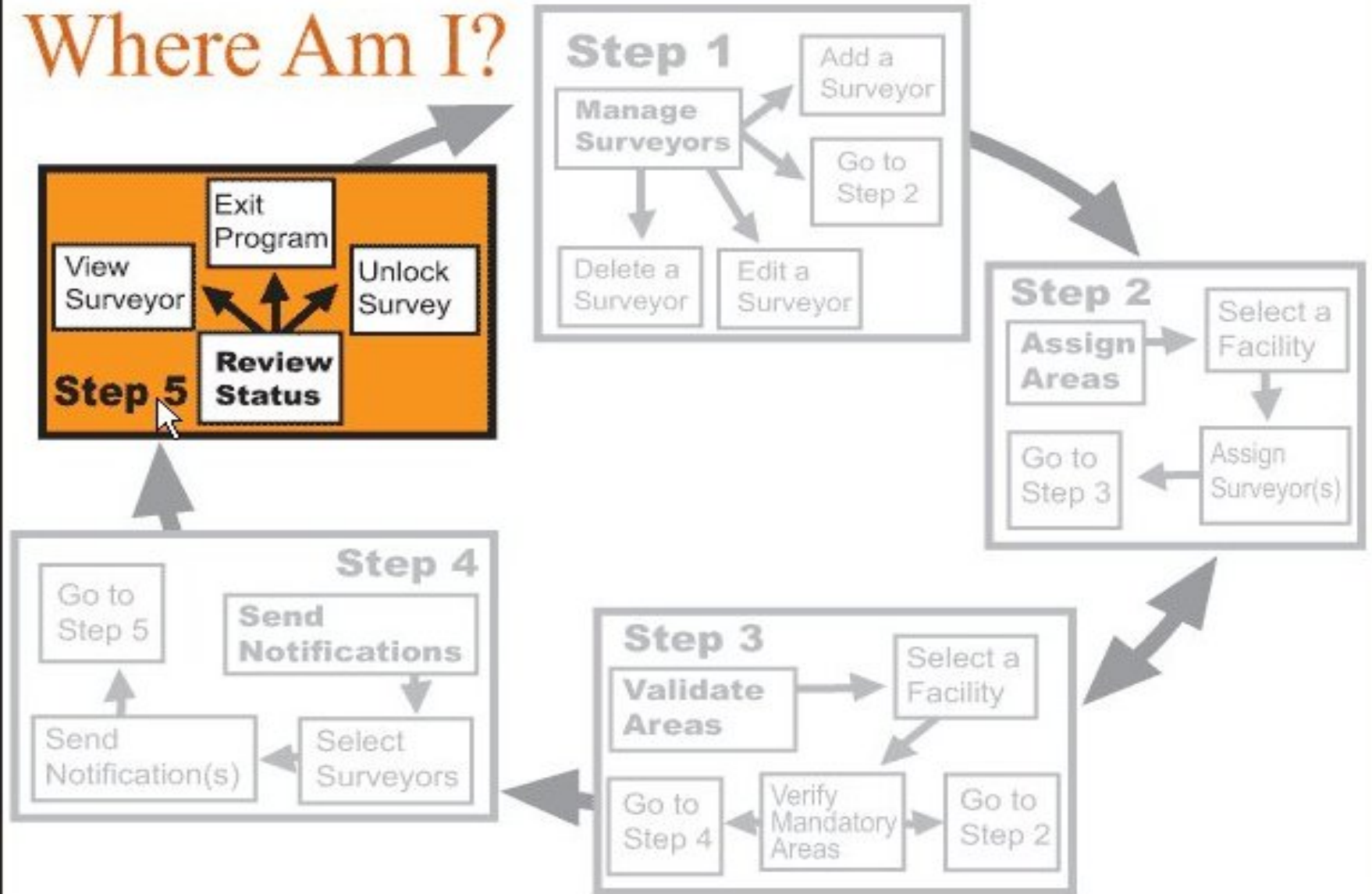
Step 2
Assign Areas
- Select a Facility
- Assign Surveyor(s)
- Go to Step 3

Step 3
Validate Areas
- Select a Facility
- Verify Mandatory Areas
- Go to Step 4
- Go to Step 2

Step 4
- Go to Step 5
- Send Notifications
- Send Notification(s)
- Select Surveyors

Step 5
- Exit Program
- View Surveyor
- Unlock Survey
- Review Status

REPORTS

Coordinator Status Report

Risk Management
Self Inspection Survey
Coordinator Self Inspection Status Report
Organization: RISK VISITORS ORGANIZATION
SIS Year: 2010

	Total Facilities	Completed	Started	Not Started	Not Assigned
QTY	3	0	3	-2	2
Percent	-	0%	100%	-66.67%	66.67%

Facility Name - Number	Inspectable Area	Surveyor	Status
Building 1	Laboratories	Joe Rippard	0 of 16
	General	Don Leonard	0 of 48
	Maintenance Shops	Keith Butterfield	2 of 71
	Physical Security	Jeff Rose	4 of 18
Building 2	K-12 Schools General	Patricia Hayden	0 of 35
	General	Mark Guinee	0 of 48

Thank You Again For Your Participation In The 2009 Self Inspection Survey Program

All of the information you will submit will be kept in strict confidence by Risk Management. The data will be used to identify trends, generate and develop more appropriate training, and to research better methods process and procedures for safety management within all state agencies, school districts and charter schools.

Contact Information

- Jeff Rose   Program Administrator

  Jeffrose@utah.gov

- Tim Villnave   Program Administrator

  Tvillnave@utah.gov

- Mike Marshall   Training

  Mcmarshall@utah.gov

- Brian Nelson   Loss Control Manager/Administrator

  Benelson@utah.gov

- Risk Phone   (801) 538-9560

- Inspection Email   SIS@Utah.gov